Recreation Vehicle Industry Association

1984...A Year-End Report

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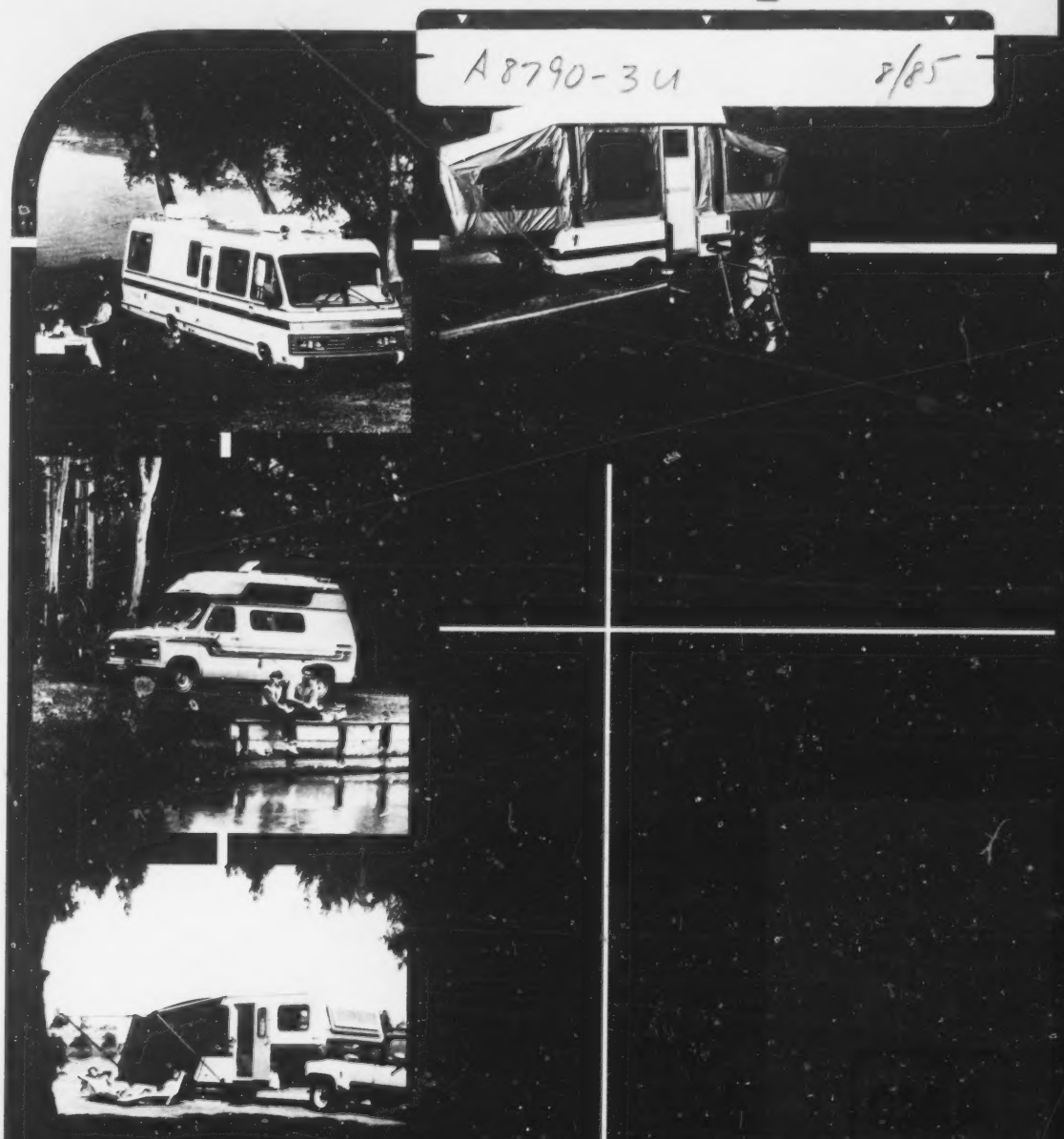

RVs... America's Family Camping Vehicles

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RVs...America's Family Camping Vehicles
A Year-End Report/1984

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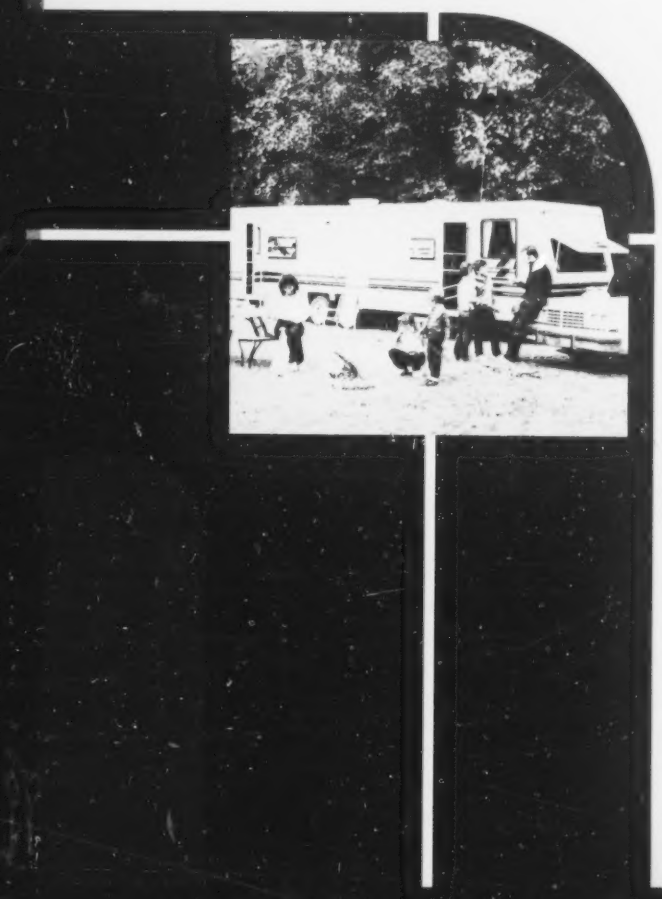

In the report that follows we have presented results of RV production for the year 1984 in several ways. Shipments by product category, product mix, wholesale and retail value of shipments, regional and state-by-state sales patterns are shown in graphic as well as numeric exhibits. In many of the analyses we have offered historical comparisons which are intended to provide insight to emerging trends. And in an Appendix we have compared RV production to widely accepted economic indicators.

All of this is, of course, intended to help the reader draw a clearer picture of the RV market and its performance over time.

Data used for this report were collated from surveys of RV manufacturers conducted annually by RVIA. Monthly reports on unit shipments and average wholesale price by length for each category of RV do not appear in this report. That information is available by contacting the RVIA Marketing Department.

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INDUSTRY HIGHLIGHTS

1984 marked the fourth consecutive year recreation vehicle shipments were on the rise as a total of 398,200 units were delivered to retailers.

Up more than 11% over last year each vehicle category reported increases, and increases over last year occurred in all but two months.

The "green light" was on in the first quarter of 1984 as manufacturers shipped 103,100 units, 25.3% more than first quarter 1983. Seasonally adjusted, that was an annual rate of nearly 420,000 units, a 7% increase over the preceding quarter.

But in the second quarter, as interest rates increased[1] and dealer inventories swelled,[2] wholesale shipments slowed 6% on an annual rate basis. Still, deliveries in April had reached 44,000 units (high for the year) and sandwiched between March's 41,600 units and May's 40,000 units provided the largest three-month period since the summer of 1978.

The pattern was repeated in the third quarter – the 90,200 units delivered were higher than third quarter of 1983 while the annual rate slipped to just under 375,000 units. Total shipments were greater, but the rate of increase had definitely slowed.

It was the fourth quarter that turned things back around as shipments totaled 83,800 units, an annualized rate of nearly 407,000 units (more than 8% better than the third quarter). Interest rates had reversed their earlier increases and late seasonal retail sales forced restocking of dealer lots.

The increased shipment total and the generally larger RV sold this year enabled total sales dollars to reach $7.7 billion (see page 6) in 1984, an all time high.

Sales increases were largest for type A motor homes which reported total retail value of shipments of $1.9 billion, nearly one-quarter of total RV dollar sales. Van conversions remained the largest dollar volume leader with $3.3 billion in sales and 43.2% of the total RV market share.

Total travel trailer sales topped $1.1 billion, an increase over 1983 of 8.5%. Truck camper sales reached $45.8 million and folding camping trailers $267.5 million, representing a 26.9% and 18.7% increase, respectively.

Regionally, wholesale shipment destinations remained relatively unchanged from last year. Again, the Pacific region was king with one in five RVs shipped heading to one of the five westernmost states (see page 5). Second was the East North Central which contained three of the top ten states, followed by the South Atlantic and West South Central regions. Combined, these four regions purchased nearly two-thirds of the industry's total product in 1984.

398,200 Units
Total RV Shipments

$7.7 Billion
Record Sales Year

1 in 10
Vehicle Owning Households
Now Own an RV

There were, however, a few surprises in the state-by-state rankings this year. Nothing new about California's number one ranking (it led in seven of the eleven vehicle categories) or its 12.76% market share (see page 19). Nor was it surprising to see Texas second, Florida third or Michigan, Ohio and Pennsylvania four, five and six. But moving up to seventh place was Illinois. Washington advanced two positions to finish eighth while Oregon jumped back into the top ten for the first time in six years to the number nine slot. Rounding out the top ten was New York, up from the twelfth spot last year. In total, more than half of industry shipments went to these top ten states.

Over the past several years the industry has experienced a general increase in unit sizing as illustrated by the table on page 13. Travel trailers over 25 feet in length made up 45% of the market just three years ago, while in 1984 the percentage had grown to nearly 54%. In 1983, 12.8% of all fifth wheel travel trailers were under 20 feet while one year later, the percentage of this size vehicle was down to 10.8%.

Similar shifts can be seen in the other categories like folding camping trailers where in 1983 only 4.7% were 12 feet or more. A year later, that figure had risen to 10.5%. The increased size can be seen in motor homes too, where type A conventional units under 26 feet numbered one in five during 1983, but were reduced to one in six by 1984.

The average price of all RVs rose nearly 10% in 1984 due largely to this increase in size, although some market share shifting from travel trailers to type A motor homes would account for part of this rise.[3]

In general, then, we can conclude that 1984 was indeed a good year for RV producers and their component part suppliers. The ownership rate had grown to nearly 10% of all vehicle-owning households in the U. S. during 1984 (see page 12-14). And with the consumer's financial situation expected to remain favorable, RV sales should continue to prosper right along with them. ■

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[1] Data provided by U. S. Department of Commerce, Bureau of Economic Analysis, Business Conditions Digest page 73.

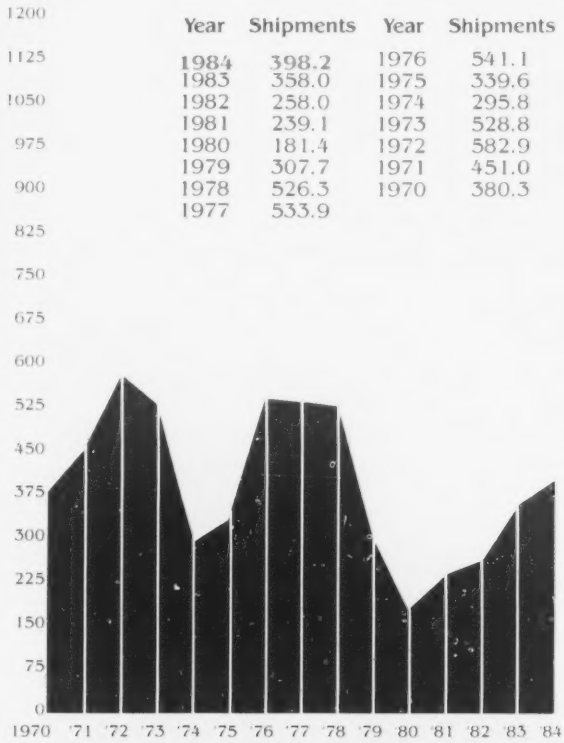
[2] See Index of Retail Activity, RVIA Monthly Marketing Report, December 1984, page 13.

[3] 1984 market share comparisons show travel trailers at 23.2% down from 1983's 25.1%. For motor homes type A market share for 1984 was 10.6% up from 1983's 9.3%. Other categories showed little change. See RVIA Year-End Reports 1983 and 1984 page 6.

Shipments Review

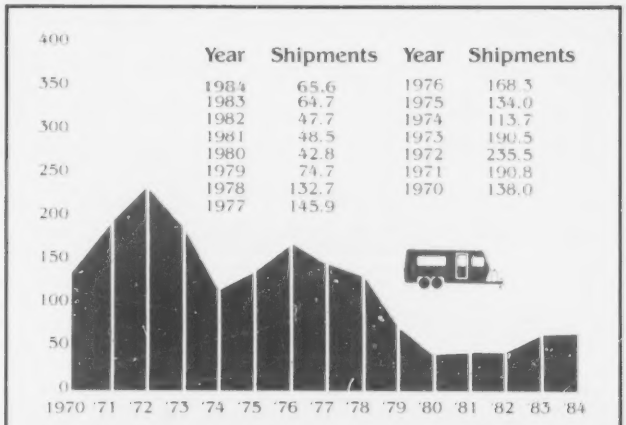
Shipments by Category/1970-1984
(in Thousands)

Year	Shipments	Year	Shipments
1984	398.2	1976	541.1
1983	358.0	1975	339.6
1982	258.0	1974	295.8
1981	239.1	1973	528.8
1980	181.4	1972	582.9
1979	307.7	1971	451.0
1978	526.3	1970	380.3
1977	533.9		



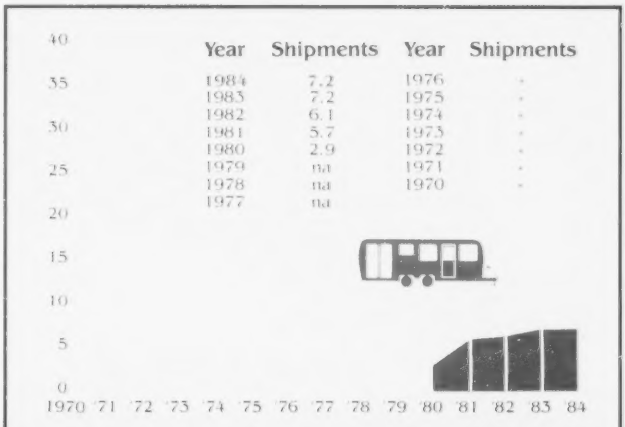
Total Shipments

Year	Shipments	Year	Shipments
1984	65.6	1976	168.3
1983	64.7	1975	134.0
1982	47.7	1974	113.7
1981	48.5	1973	190.5
1980	42.8	1972	235.5
1979	74.7	1971	190.8
1978	132.7	1970	138.0
1977	145.9		



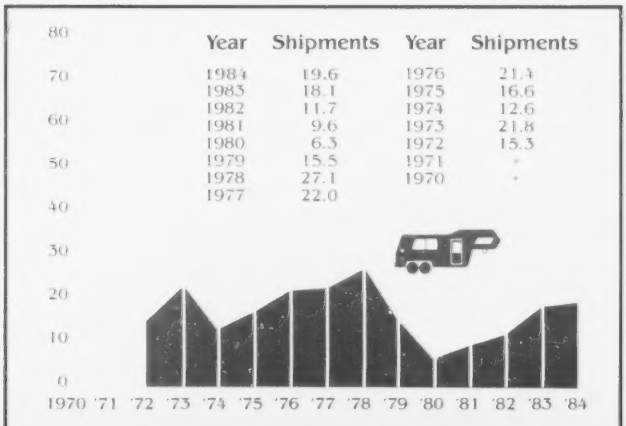
Travel Trailers (Conventional)

Year	Shipments	Year	Shipments
1984	7.2	1976	*
1983	7.2	1975	*
1982	6.1	1974	*
1981	5.7	1973	*
1980	2.9	1972	*
1979	na	1971	*
1978	na	1970	*
1977	na		



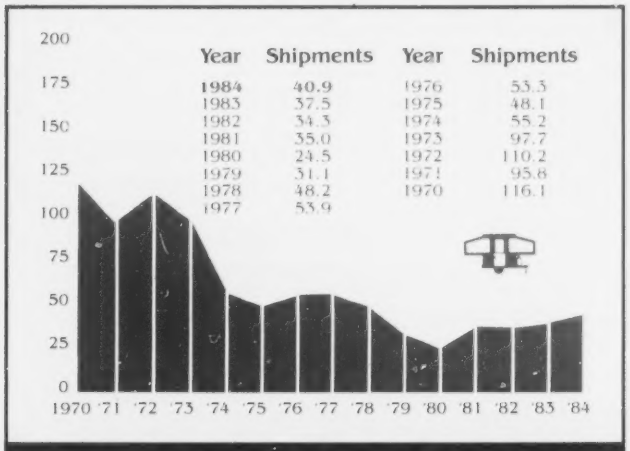
Travel Trailers (Park)

Year	Shipments	Year	Shipments
1984	19.6	1976	21.4
1983	18.1	1975	16.6
1982	11.7	1974	12.6
1981	9.6	1973	21.8
1980	6.3	1972	15.3
1979	15.5	1971	*
1978	27.1	1970	*
1977	22.0		



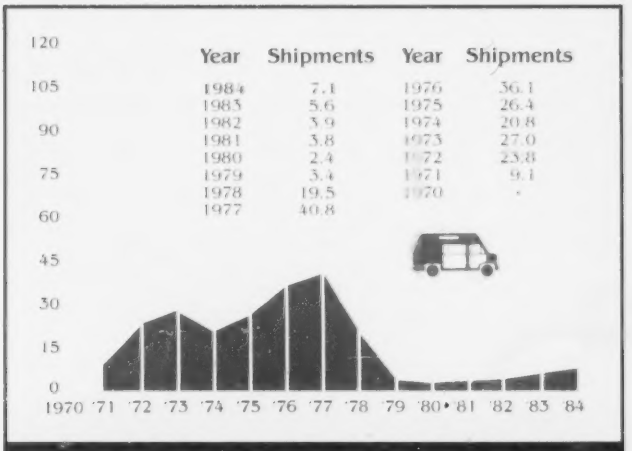
Travel Trailers (Fifth Wheel)

*Data not available



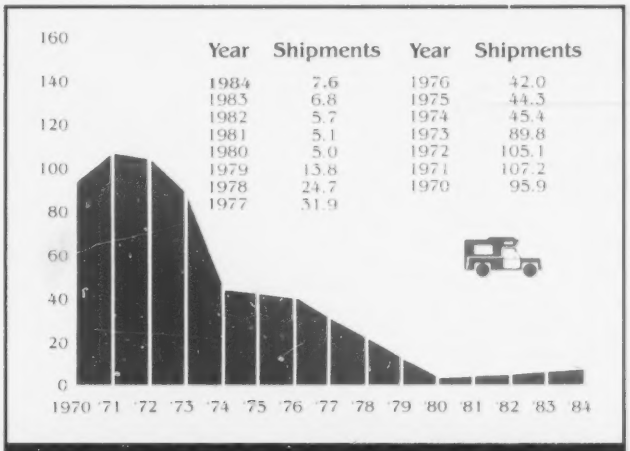
Year	Shipments	Year	Shipments
1984	40.9	1976	53.5
1983	37.5	1975	48.1
1982	34.3	1974	55.2
1981	35.0	1973	97.7
1980	24.5	1972	110.2
1979	31.1	1971	95.8
1978	48.2	1970	116.1
1977	53.9		

Folding Camping Trailers



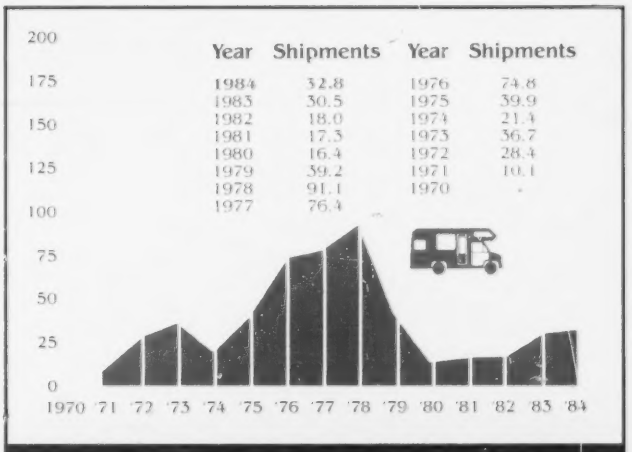
Year	Shipments	Year	Shipments
1984	7.1	1976	36.1
1983	5.6	1975	26.4
1982	3.9	1974	20.8
1981	3.8	1973	27.0
1980	2.4	1972	23.8
1979	3.4	1971	9.1
1978	19.5	1970	*
1977	40.8		

Motor Homes (Type B)



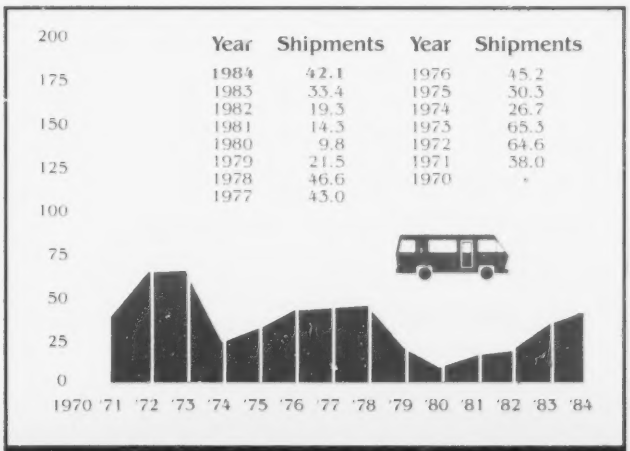
Year	Shipments	Year	Shipments
1984	7.6	1976	42.0
1983	6.8	1975	44.3
1982	5.7	1974	45.4
1981	5.1	1973	89.8
1980	5.0	1972	105.1
1979	13.8	1971	107.2
1978	24.7	1970	95.9
1977	31.9		

Truck Campers



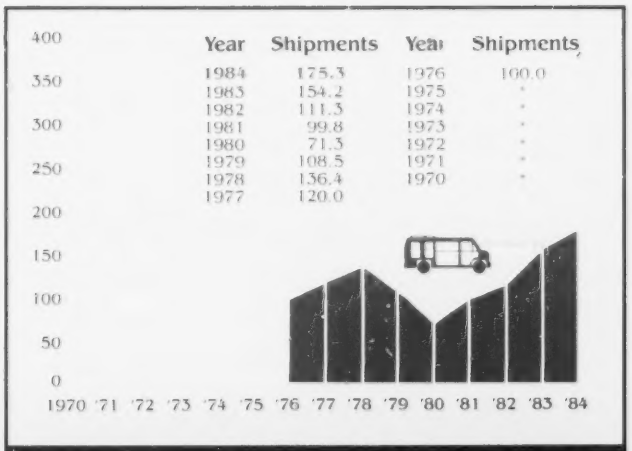
Year	Shipments	Year	Shipments
1984	32.8	1976	74.8
1983	30.5	1975	39.9
1982	18.0	1974	21.4
1981	17.3	1973	36.7
1980	16.4	1972	28.4
1979	39.2	1971	10.1
1978	91.1	1970	*
1977	76.4		

Motor Homes (Type C)



Year	Shipments	Year	Shipments
1984	42.1	1976	45.2
1983	33.4	1975	30.3
1982	19.3	1974	26.7
1981	14.3	1973	65.3
1980	9.8	1972	64.6
1979	21.5	1971	38.0
1978	46.6	1970	*
1977	43.0		

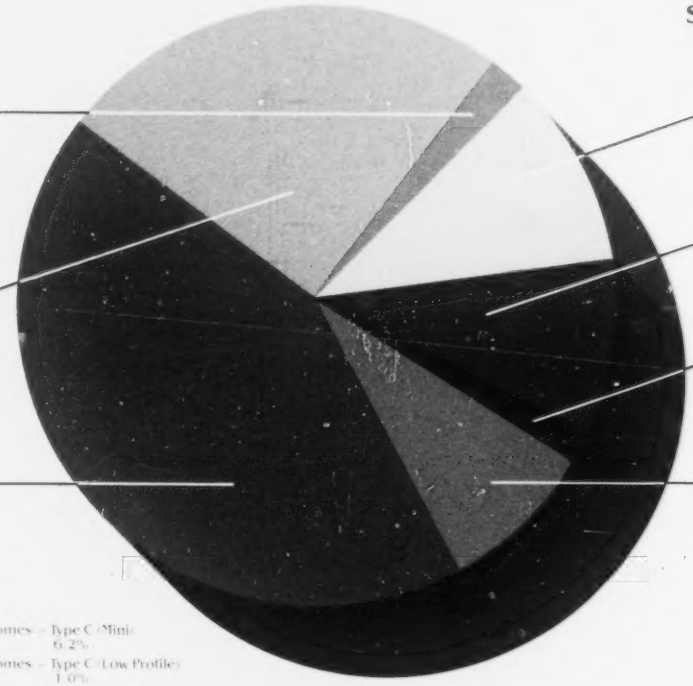
Motor Homes (Type A)



Year	Shipments	Year	Shipments
1984	175.3	1976	100.0
1983	154.2	1975	*
1982	111.3	1974	*
1981	99.8	1973	*
1980	71.3	1972	*
1979	108.5	1971	*
1978	136.4	1970	*
1977	120.0		

Van Conversions

Market Share by Category/1984



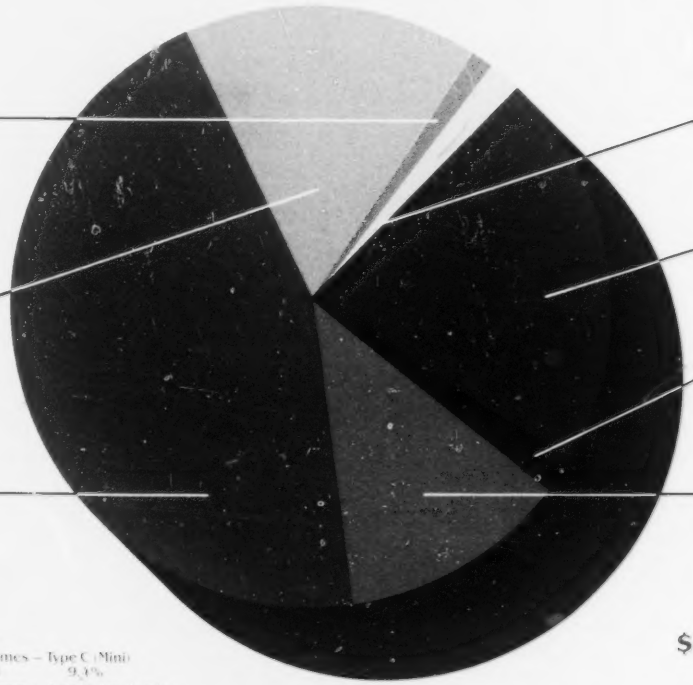
	Shipments in Thousands	Percent of Total
Truck Campers	7.6	1.9%
Travel Trailers (All)[1]	92.4	23.2%
Van Conversions	175.3	44.0%
Folding Camping Trailers	40.9	10.3%
Motor Homes – Type A	42.1	10.6%
Motor Homes – Type B	7.1	1.8%
Motor Homes – Type C[2]	32.8	8.2%
Shipments		**Total RVs**
	398.2	**100.0%**

1 Includes

Conventional Travel Trailers	65.6 16.5%
Park Trailers	7.2 1.8%
Fifth Wheel Trailers	19.6 4.9%

2 Includes

Motor Homes – Type C (Mini)	24.5 6.2%
Motor Homes – Type C (Low Profile)	4.1 1.0%
Motor Homes – Type C (Compact)	4.2 1.0%



	$ Value in Millions	Percent of Total
Truck Campers	$ 45.8	0.6%
Travel Trailers (All)[1]	$1,157.4	15.0%
Van Conversions	$3,339.8	43.2%
Folding Camping Trailers	$ 267.5	3.5%
Motor Homes – Type A	$1,862.8	24.1%
Motor Homes – Type B	$ 148.1	1.9%
Motor Homes – Type C[2]	$ 911.3	11.8%
Retail Value		**Total RVs**
	$7,732.7	**100.0%**

1 Includes

Conventional Travel Trailers	$749.1 9.7%
Park Trailers	$116.5 1.5%
Fifth Wheel Trailers	$291.8 3.8%

2 Includes

Motor Homes – Type C (Mini)	$725.4 9.4%
Motor Homes – Type C (Low Profile)	$107.3 1.4%
Motor Homes – Type C (Compact)	$ 80.6 1.0%

Shipments by Region/1984

Pacific

Year	Percent
1984	**19.59%**
1983	19.50%
1982	18.87%
1981	20.86%
1980	20.25%
1979	21.58%
1978	22.85%

Mountain

Year	Percent
1984	**9.39%**
1983	10.58%
1982	10.06%
1981	10.62%
1980	9.65%
1979	10.00%
1978	10.11%

West North Central

Year	Percent
1984	**8.73%**
1983	10.21%
1982	10.15%
1981	9.51%
1980	8.18%
1979	10.44%
1978	10.42%

West South Central

Year	Percent
1984	**12.94%**
1983	11.51%
1982	14.43%
1981	13.92%
1980	13.29%
1979	9.72%
1978	10.29%

East North Central

Year	Percent
1984	**18.01%**
1983	17.89%
1982	18.04%
1981	16.39%
1980	17.44%
1979	19.49%
1978	20.21%

East South Central

Year	Percent
1984	**3.54%**
1983	3.40%
1982	3.50%
1981	3.18%
1980	3.00%
1979	3.56%
1978	3.33%

South Atlantic

Year	Percent
1984	**13.86%**
1983	13.20%
1982	12.42%
1981	12.87%
1980	13.38%
1979	11.55%
1978	10.56%

Middle Atlantic

Year	Percent
1984	**8.71%**
1983	8.62%
1982	8.77%
1981	9.30%
1980	11.06%
1979	10.15%
1978	9.23%

New England

Year	Percent
1984	**4.18%**
1983	3.76%
1982	3.74%
1981	3.36%
1980	3.75%
1979	3.15%
1978	3.00%

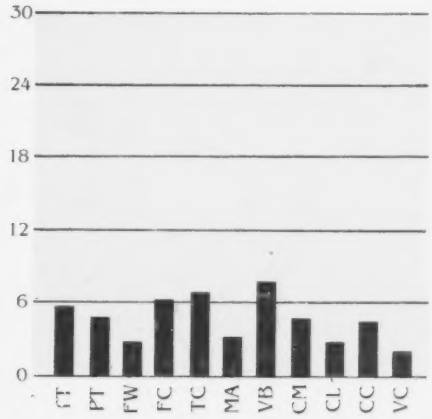
Deliveries to States by RV Category/1984
(in Percentage)

	Conventional Travel Trailers	Park Trailers	Fifth Wheel Trailers	Folding Camping Trailers	Truck Campers	Motor Homes Type A	Van Campers Type B	Motor Homes Type C (Mini)	Motor Homes Type C (Low Profile)	Motor Homes Type C (Compact)	Van Conversions	1984 Total
New England	**5.65%**	**4.5?%**	**2.60%**	**6.32%**	**6.64%**	**3.12%**	**7.74%**	**4.47%**	**2.96%**	**4.30%**	**2.01%**	**4.18%**
Connecticut	.95	.32	.29	1.08	1.21	.48	2.84	.64	.45	.50	.49	.71
Maine	.65	.76	.53	.77	1.33	.23	.75	.40	*	.41	.20	.48
Massachusetts	2.30	2.26	.89	2.89	2.20	1.39	2.09	1.73	1.60	2.23	.82	1.75
New Hampshire	1.16	.93	.46	.82	1.16	.58	1.12	.79	.27	.62	.25	.71
Rhode Island	.29	.05	.16	.22	*	.34	.07	.57	.64	.21	.15	.26
Vermont	.32	.05	.26	.54	.73	.10	.67	.33	*	.33	.09	.27
Middle Atlantic	**10.08**	**14.55**	**5.09**	**13.58**	**6.68**	**6.25**	**16.57**	**9.91**	**12.28**	**5.50**	**5.75**	**8.71**
New Jersey	2.10	4.21	.67	2.20	.78	1.17	3.51	2.01	3.96	1.32	1.21	1.71
New York	3.57	1.81	2.05	5.33	3.27	2.02	5.90	3.79	2.96	2.23	1.83	3.06
Pennsylvania	4.41	8.54	2.37	6.05	2.63	3.05	7.16	4.11	5.35	1.94	2.71	3.94
E. North Central	**15.70**	**20.21**	**14.04**	**22.48**	**18.27**	**10.45**	**19.18**	**17.25**	**19.63**	**12.03**	**24.68**	**18.01**
Illinois	3.30	5.90	2.59	3.91	2.16	2.07	1.87	3.07	3.27	1.16	5.31	3.55
Indiana	2.77	3.04	3.25	3.03	3.93	2.15	6.42	3.38	4.33	1.53	3.22	2.96
Michigan	4.62	5.14	4.27	7.20	5.14	2.65	4.55	5.33	4.05	3.64	7.53	5.36
Ohio	3.66	5.40	2.49	5.66	2.61	2.57	5.67	3.63	6.75	3.18	6.32	4.30
Wisconsin	1.35	2.73	1.44	2.68	4.43	1.01	.67	1.84	1.24	2.52	2.30	1.84
W. North Central	**7.10**	**4.11**	**10.23**	**6.39**	**15.62**	**7.06**	**6.79**	**7.66**	**9.98**	**2.44**	**13.32**	**8.73**
Iowa	1.01	.43	1.55	1.19	1.54	1.42	.22	1.72	3.39	.87	2.14	1.48
Kansas	.79	.12	2.76	.94	.69	1.19	.82	.99	1.06	.12	2.45	1.38
Minnesota	1.59	2.14	1.49	1.34	8.63	1.75	1.34	2.12	4.33	.74	2.73	2.05
Missouri	2.50	1.02	2.39	2.37	1.26	1.60	2.09	1.37	.60	.33	2.94	2.21
Nebraska	.54	.10	1.02	.30	.47	.42	.07	.51	.36	.21	1.82	.78
North Dakota	.41	.12	.29	.08	1.82	.37	1.79	.65	.24	*	.89	.50
South Dakota	.26	.19	.72	.17	1.21	.31	.45	.31	*	.17	.35	.33
South Atlantic	**14.52**	**27.61**	**6.68**	**13.51**	**6.26**	**14.34**	**23.81**	**12.06**	**24.38**	**13.23**	**14.66**	**13.86**
Delaware	.45	.12	.16	.14	.28	.11	*	.08	.51	.04	.11	.21
Florida	3.65	22.19	2.54	3.61	2.01	8.17	11.42	6.11	8.86	8.68	7.23	5.81
Georgia	1.63	.38	.59	1.62	.59	.84	.45	1.10	1.85	.66	1.96	1.39
Maryland	1.59	.71	.65	1.83	.73	1.14	3.13	1.06	3.75	.95	1.37	1.39
North Carolina	2.52	.83	1.09	2.58	.26	1.63	3.36	1.22	3.39	1.24	1.33	1.83
South Carolina	1.33	1.62	.40	1.06	.71	.66	.52	.55	.60	.37	.74	.88
Virginia	2.01	1.59	.64	1.87	1.07	1.39	2.46	1.35	4.96	.45	1.60	1.64
West Virginia	1.34	.17	.61	.80	.59	.40	2.46	.58	.45	.83	.30	.71
E. South Central	**3.23**	**1.45**	**2.00**	**3.39**	**1.28**	**3.27**	**1.72**	**1.99**	**4.60**	**1.65**	**5.84**	**3.54**
Alabama	.87	.43	.35	.73	.09	1.22	.45	.57	2.66	.41	1.04	.87
Kentucky	.62	.36	.42	.85	.59	.42	.15	.38	1.15	.50	.77	.62
Mississippi	.53	.31	.31	.17	.05	.35	.30	.27	.03	.29	1.36	.56
Tennessee	1.21	.36	.93	1.64	.55	1.28	.82	.77	.76	.45	2.66	1.49
W. South Central	**12.77**	**7.73**	**12.55**	**11.36**	**4.95**	**11.40**	**5.15**	**7.87**	**7.68**	**4.42**	**19.87**	**12.94**
Arkansas	1.26	.43	1.17	1.36	.55	.78	.52	.66	.36	.04	1.01	1.02
Louisiana	1.46	.36	.55	1.15	.33	1.48	.52	1.07	1.24	.62	3.30	1.65
Oklahoma	1.43	.83	2.61	1.04	1.04	1.47	1.27	1.29	.85	.29	3.35	1.83
Texas	8.61	6.11	8.23	7.81	3.03	7.68	2.84	4.84	5.23	3.47	12.22	8.44
Mountain	**9.98**	**12.65**	**14.11**	**7.42**	**11.11**	**12.02**	**8.13**	**9.80**	**9.56**	**13.15**	**5.74**	**9.39**
Arizona	2.11	10.44	2.29	1.54	1.99	4.23	5.30	3.40	2.03	3.80	1.31	2.52
Colorado	.87	.10	2.65	1.50	2.32	2.34	.45	2.10	2.27	3.35	1.77	1.70
Idaho	1.59	.10	2.21	.51	1.56	1.08	.30	.61	.39	.87	.49	1.00
Montana	.79	.10	1.67	.37	.40	.61	.52	.69	.42	1.24	.31	.63
Nevada	.91	.52	1.17	.62	1.09	1.54	.22	.88	2.57	1.24	.26	.86
New Mexico	.79	.38	1.06	1.13	2.54	1.00	1.27	.81	.57	1.61	.47	.86
Utah	2.42	.68	2.60	1.50	.64	1.03	.07	1.19	.94	.91	.79	1.49
Wyoming	.50	.14	.46	.24	.57	.19	*	.12	.36	.12	.35	.33
Pacific	**20.10**	**6.35**	**31.35**	**14.90**	**28.10**	**29.95**	**10.37**	**28.48**	**8.26**	**43.28**	**7.19**	**19.59**
Alaska	.11	*	.04	.04	.76	.62	.45	.96	.67	.50	.06	.27
California	11.59	3.54	17.54	11.19	19.53	21.46	5.60	21.13	.15	33.77	3.87	12.76
Hawaii	*	*	*	*	*	*	*	*	*	*	.01	*
Oregon	3.94	1.19	7.27	1.40	3.41	3.78	.75	2.95	3.51	5.46	1.41	3.07
Washington	4.46	1.62	6.51	2.27	4.41	4.09	3.58	3.44	3.93	3.56	1.84	3.49
Foreign	.77	.76	1.32	.66	1.09	2.14	.75	.53	.67	*	.95	1.02
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

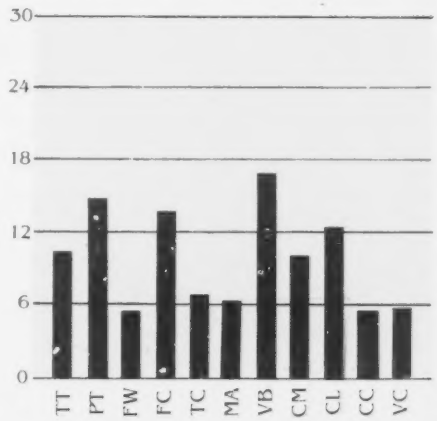
*Not measurable

Regional Market Share by RV Category/1984
(in Percentage)

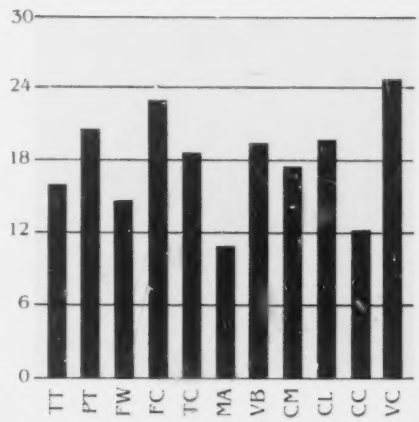
New England



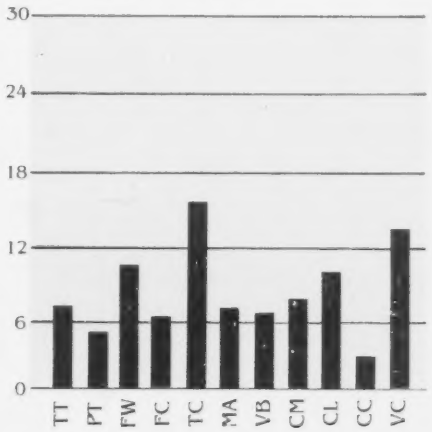
Middle Atlantic



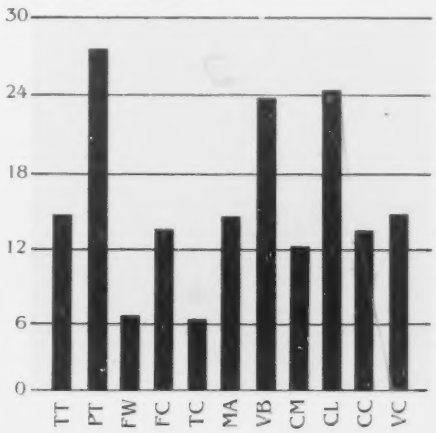
East North Central



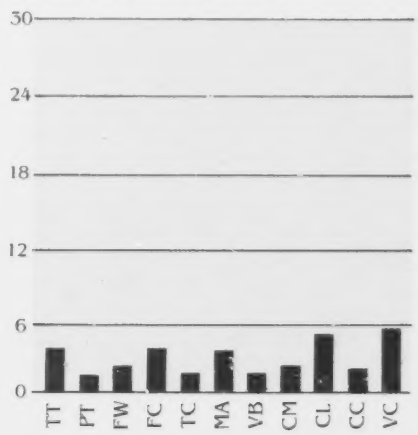
West North Central



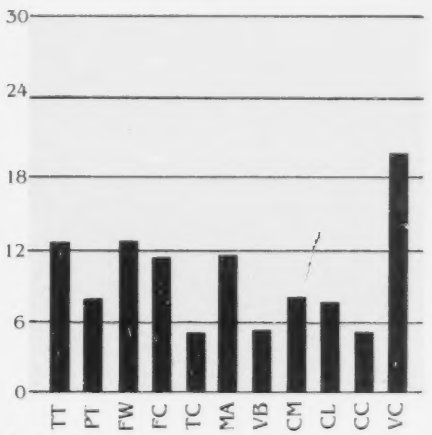
South Atlantic



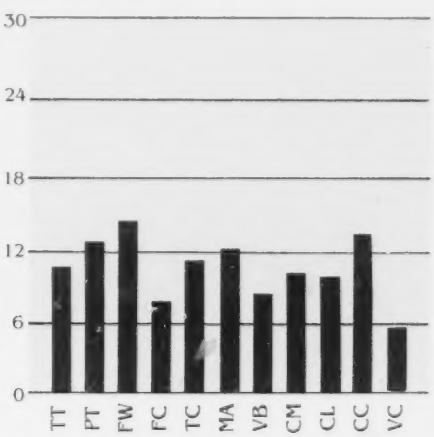
East South Central



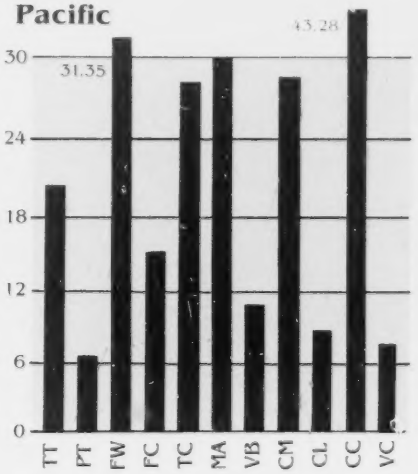
West South Central



Mountain



Pacific



Legend

TT	Conventional Travel Trailers
PT	Park Trailers
FW	Fifth Wheel Trailers
FC	Folding Camping Trailers
TC	Truck Campers
MA	Motor Homes – Type A
VB	Van Campers – Type B
CM	Motor Homes – Type C (Mini)
CL	Motor Homes – Type C (Low Profile)
CC	Motor Homes – Type C (Compact)
VC	Van Conversions

National Market Share of RV Categories by Region/1984
(by Percent)

NE - New England
Connecticut,
Maine, Massachusetts,
New Hampshire, Rhode Island, Vermont

MA - Middle Atlantic
New Jersey, New York,
Pennsylvania

ENC - East North Central
Illinois, Indiana,
Michigan, Ohio, Wisconsin

WNC - West North Central
Iowa, Kansas, Minnesota,
Missouri, Nebraska, North Dakota,
South Dakota

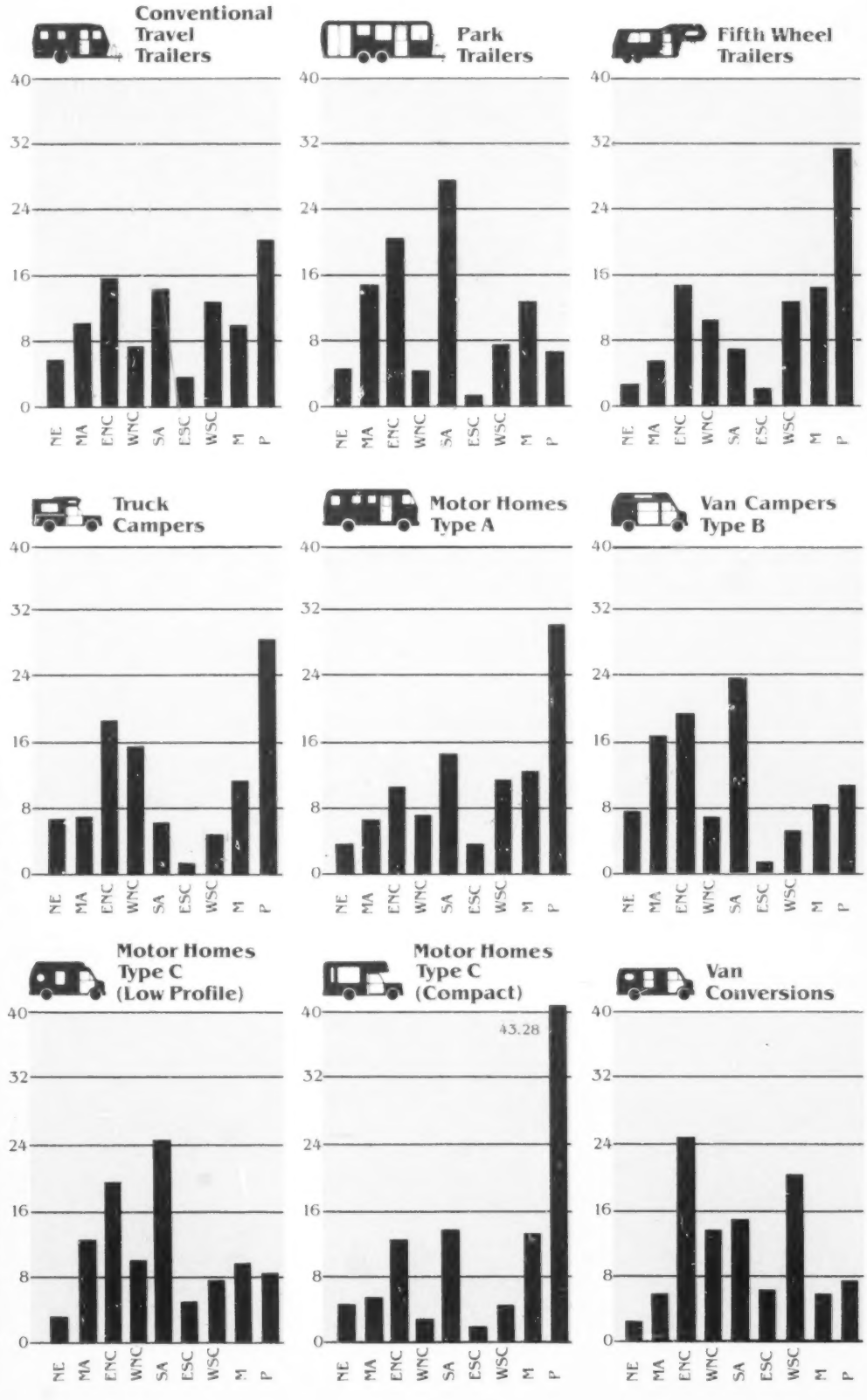
SA - South Atlantic
Delaware, Florida, Georgia,
Maryland, North Carolina,
South Carolina, Virginia, West Virginia

ESC - East South Central
Alabama, Kentucky,
Mississippi, Tennessee

WSC - West South Central
Arkansas, Louisiana, Oklahoma, Texas

M - Mountain
Arizona, Colorado, Idaho, Montana,
Nevada, New Mexico, Utah, Wyoming

P - Pacific
Alaska, California, Hawaii, Oregon
Washington

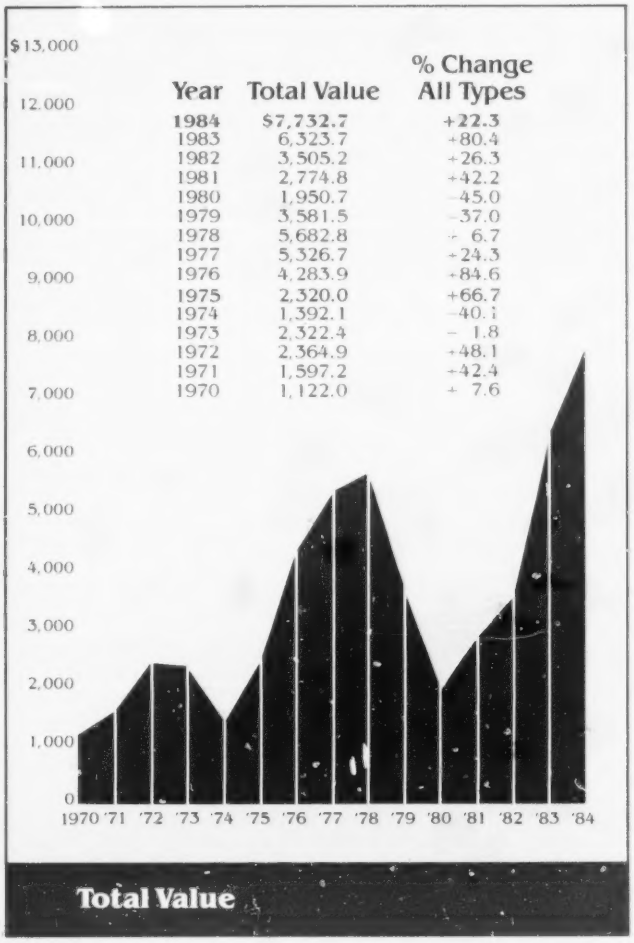


RV Unit Deliveries to States by Years, 1976 – 1984
(in Percentage)

	1984	1983	1982	1981	1980	1979	1978	1977	1976
New England	**4.18%**	**3.76%**	**3.74%**	**3.36%**	**3.75%**	**3.15%**	**3.00%**	**3.46%**	**3.61%**
Connecticut	.71	.70	.69	.59	.68	.67	.61	.66	.70
Maine	.48	.53	.44	.39	.33	.42	.44	.62	.54
Massachusetts	1.75	1.45	1.48	1.35	1.54	1.17	1.16	1.27	1.40
New Hampshire	.71	.68	.66	.59	.77	.52	.46	.60	.62
Rhode Island	.26	.25	.29	.28	.30	.22	.17	.17	.19
Vermont	.27	.15	.18	.16	.13	.15	.16	.14	.16
Middle Atlantic	**8.71**	**8.82**	**8.77**	**9.30**	**11.05**	**10.15**	**9.23**	**9.77**	**9.97**
New Jersey	1.71	1.57	1.65	1.62	1.62	1.50	1.45	1.45	1.47
New York	3.06	3.00	3.01	3.40	4.15	4.39	3.82	3.84	3.74
Pennsylvania	3.94	4.25	4.11	4.28	5.29	4.61	3.96	4.48	4.76
East North Central	**18.01**	**17.89**	**18.04**	**16.39**	**17.44**	**19.49**	**20.21**	**21.05**	**22.17**
Illinois	3.55	3.91	4.02	3.55	3.32	3.85	3.88	4.30	4.60
Indiana	2.96	3.45	3.80	3.51	3.62	3.83	3.54	3.50	3.78
Michigan	5.36	4.35	4.54	3.65	4.47	4.89	5.93	5.69	5.95
Ohio	4.30	4.32	4.03	4.06	4.36	4.76	4.79	5.20	5.23
Wisconsin	1.84	1.86	1.65	1.62	1.67	2.15	2.07	2.36	2.61
West North Central	**8.73**	**10.12**	**10.15**	**9.51**	**8.18**	**10.44**	**10.42**	**10.81**	**12.29**
Iowa	1.48	1.99	2.11	2.15	1.78	2.21	2.17	2.17	2.54
Kansas	1.38	1.34	1.52	1.53	1.60	1.36	1.52	1.79	2.10
Minnesota	2.05	2.65	1.96	1.91	1.61	2.64	2.57	2.62	2.81
Missouri	2.21	2.30	2.41	1.90	1.85	2.05	2.03	1.91	2.19
Nebraska	.78	.75	1.06	.88	.70	.98	.97	.99	1.09
North Dakota	.50	.62	.60	.57	.23	.63	.58	.68	.86
South Dakota	.33	.47	.49	.57	.43	.57	.58	.65	.70
South Atlantic	**13.86**	**13.20**	**12.42**	**12.87**	**13.38**	**11.55**	**10.56**	**10.02**	**10.95**
Delaware	.21	.26	.20	.22	.33	.21	.23	.20	.22
Florida	5.81	5.70	4.70	4.85	4.77	3.65	3.17	2.61	2.57
Georgia	1.39	.99	1.29	1.35	1.32	1.50	1.29	1.31	1.43
Maryland	1.39	1.35	1.27	1.27	1.42	1.45	1.31	1.41	1.52
North Carolina	1.83	1.89	1.83	2.06	1.95	1.51	1.60	1.52	1.61
South Carolina	.88	.92	.71	.84	.77	.62	.59	.56	.65
Virginia	1.64	1.51	1.70	1.39	1.79	1.47	1.48	1.53	2.10
West Virginia	.71	.58	.72	.87	1.03	1.14	.89	.88	.85
East South Central	**3.54**	**3.40**	**3.50**	**3.18**	**3.00**	**3.56**	**3.33**	**3.02**	**2.95**
Alabama	.87	.93	.80	.83	.71	1.08	.94	.66	.69
Kentucky	.62	.70	.60	.50	.43	.60	.83	.85	.65
Mississippi	.56	.54	.55	.51	.42	.57	.46	.40	.47
Tennessee	1.49	1.23	1.55	1.34	1.44	1.32	1.10	1.11	1.14
West South Central	**12.94**	**11.51**	**14.43**	**13.92**	**13.29**	**9.72**	**10.29**	**10.32**	**11.03**
Arkansas	1.02	1.05	.94	.84	.94	.71	.73	.69	.72
Louisiana	1.65	1.50	1.64	2.07	2.15	1.33	1.34	1.12	1.23
Oklahoma	1.83	1.71	2.72	3.07	1.98	1.76	1.87	2.08	2.30
Texas	8.44	7.25	9.13	7.94	8.22	5.92	6.35	6.43	6.78
Mountain	**9.39**	**10.58**	**10.06**	**10.62**	**9.65**	**10.00**	**10.11**	**9.84**	**8.76**
Arizona	2.52	3.98	2.55	2.34	1.70	1.63	1.68	1.44	1.38
Colorado	1.70	1.40	1.66	1.61	2.01	2.19	2.18	2.52	2.42
Idaho	1.00	1.02	1.02	1.24	1.11	1.10	1.40	1.32	1.12
Montana	.63	.93	.80	.87	.65	.87	.87	.87	.59
Nevada	.86	.80	.93	1.28	1.05	1.05	.84	.58	.54
New Mexico	.86	.93	.93	1.08	.68	1.02	.98	1.03	1.08
Utah	1.49	1.31	1.80	1.75	2.04	1.66	1.71	1.59	1.26
Wyoming	.33	.21	.37	.45	.41	.48	.45	.49	.37
Pacific	**19.59**	**19.50**	**18.87**	**20.86**	**20.25**	**21.58**	**22.85**	**21.71**	**18.26**
Alaska	.27	.29	.28	.31	.09	.18	.30	.30	.25
California	12.76	12.73	12.87	14.80	14.33	14.49	14.68	13.73	11.60
Hawaii	*	.01	.01	.02	.01	.01	.01	.01	.02
Oregon	3.07	3.03	2.78	2.56	2.63	3.10	3.51	3.36	2.87
Washington	3.49	3.44	2.93	3.17	3.19	3.80	4.35	4.31	3.52
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

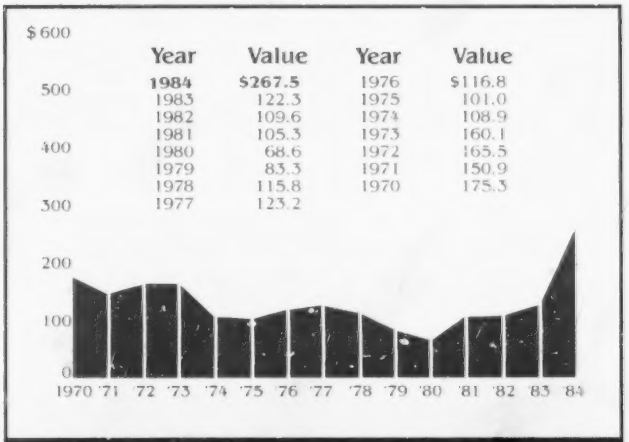
*Not measurable

Retail Value of RV Shipments
(in Millions)



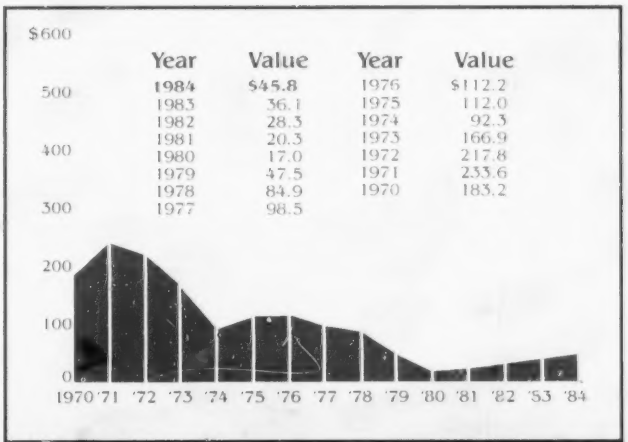
Year	Total Value	% Change All Types
1984	**$7,732.7**	**+22.3**
1983	6,323.7	+80.4
1982	3,505.2	+26.3
1981	2,774.8	+42.2
1980	1,950.7	-45.0
1979	3,581.5	-37.0
1978	5,682.8	- 6.7
1977	5,326.7	+24.3
1976	4,283.9	+84.6
1975	2,320.0	+66.7
1974	1,392.1	-40.1
1973	2,322.4	- 1.8
1972	2,364.9	+48.1
1971	1,597.2	+42.4
1970	1,122.0	+ 7.6

Total Value



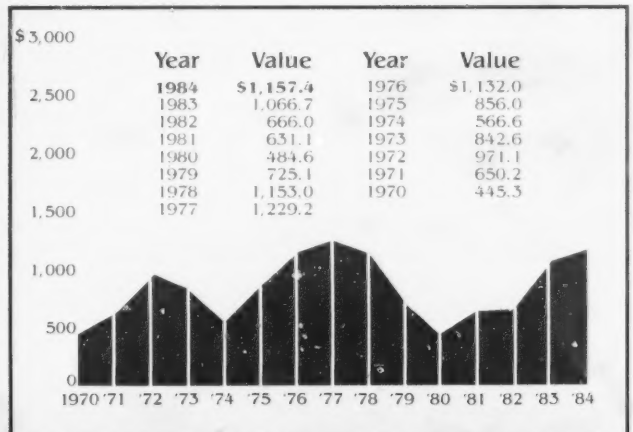
Year	Value	Year	Value
1984	**$267.5**	1976	$116.8
1983	122.3	1975	101.0
1982	109.6	1974	108.9
1981	105.3	1973	160.1
1980	68.6	1972	165.5
1979	83.3	1971	150.9
1978	115.8	1970	175.3
1977	123.2		

Folding Camping Trailers



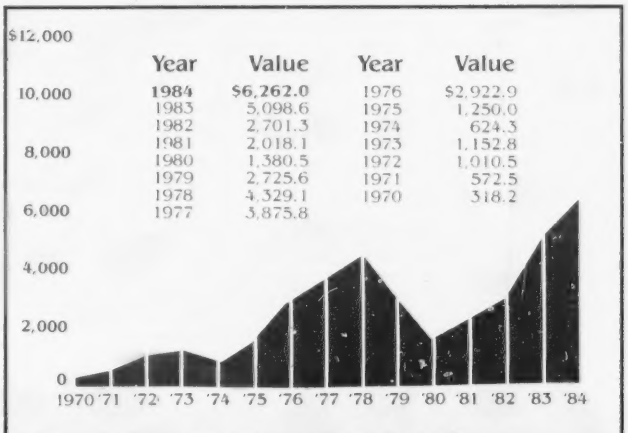
Year	Value	Year	Value
1984	**$45.8**	1976	$112.2
1983	36.1	1975	112.0
1982	28.3	1974	92.3
1981	20.3	1973	166.9
1980	17.0	1972	217.8
1979	47.5	1971	233.6
1978	84.9	1970	183.2
1977	98.5		

Truck Campers



Year	Value	Year	Value
1984	**$1,157.4**	1976	$1,132.0
1983	1,066.7	1975	856.0
1982	666.0	1974	566.6
1981	631.1	1973	842.6
1980	484.6	1972	971.1
1979	725.1	1971	650.2
1978	1,153.0	1970	445.3
1977	1,229.2		

All Travel Trailers



Year	Value	Year	Value
1984	**$6,262.0**	1976	$2,922.9
1983	5,098.6	1975	1,250.0
1982	2,701.3	1974	624.3
1981	2,018.1	1973	1,152.8
1980	1,380.5	1972	1,010.5
1979	2,725.6	1971	572.5
1978	4,329.1	1970	318.2
1977	3,875.8		

All Motor Homes*

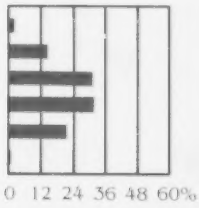
*Includes Van Conversions

Market Structure by Category and Length

Conventional Travel Trailers

Length	1984	1983	1982	1981	1980	1979	1978	1977
Under 16'	1.5%	3.3%	4.9%	4.1%	2.1%	3.0%	1.8%	1.5%
16' to 19'11"	14.6	14.6	18.3	16.7	13.5	15.2	14.2	11.7
10' to 24'11"	30.3	31.8	31.4	34.2	30.8	38.4	42.9	39.8
25' to 29'11"	30.6	27.8	24.1	23.5	29.2	28.8	28.3	28.7
30' to 35'	22.9	22.3	21.3	19.1	22.2	13.4	12.4	18.1
Over 35'	0.1	0.4	0.1	2.4	2.2	1.2	0.5	0.2
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

1984 Market Share



Park Trailers

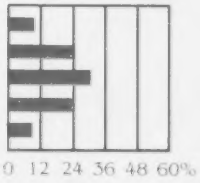
Length	1984	1983	1982	1981	1980	1979	1978	1977
Under 20'								
20' to 24'11"	.0%	0.1%						
25' to 29'11"	.0	0.5	0.2%	0.1%				
30' to 35'	50.7	58.2	58.3	63.0				
Over 35'	49.4	41.3	41.5	36.8				
	100.0%	100.0%	100.0%	100.0%				

Market Share

Fifth Wheel Travel Trailers

Length	1984	1983	1982	1981	1980	1979	1978	1977
Under 20'	10.9%	12.8%	17.1%	10.5%	6.2%	1.7%	0.9%	2.1%
20' to 24'11"	24.9	25.2	20.8	16.7	10.2	12.2	17.8	19.4
25' to 29'11"	30.5	24.3	18.1	17.2	16.6	19.5	22.6	28.0
30' to 35'	24.0	29.1	33.1	42.0	51.9	55.9	53.9	47.0
Over 35'	9.7	8.6	11.0	13.7	15.2	10.7	4.8	3.5
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Market Share



Folding Camping Trailers

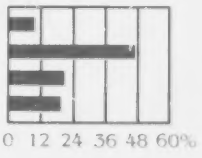
Length	1984	1983	1982	1981	1980	1979	1978	1977
Under 8'	30.4%	32.0%	33.8%	24.8%	17.7%	15.9%	14.1%	12.7%
8' to 9'11"	31.1	30.7	30.6	26.5	29.1	37.9	32.1	29.0
10' to 12'	28.1	32.6	26.5	32.1	36.1	31.5	34.6	36.9
Over 12'	10.5	4.7	9.2	16.7	17.1	14.7	19.2	21.4
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Market Share

Truck Campers

Length	1984	1983	1982	1981	1980	1979	1978	1977
Under 8'	10.6%	16.5%	13.5%	18.7%	17.3%	13.5%	6.9%	8.5%
8' to 9'5"	47.6	49.4	54.6	57.6	61.8	54.2	56.4	53.6
9'6" to 10'6"	21.6	18.1	17.1	14.2	12.7	19.1	20.4	20.5
Over 10'6"	20.2	16.0	15.1	9.5	8.2	13.1	16.3	17.4
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

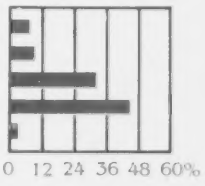
Market Share



Motor Homes – *Type A*

Length	1984	1983	1982	1981	1980	1979	1978	1977
Under 23'	7.4%	8.9%	7.5%	2.1%	9.1%	7.7%	12.4%	8.8%
23' to 25'11"	9.8	11.3	18.7	37.0	29.7	40.8	43.6	47.3
26' to 29'11"[1]	32.6	29.4	27.6	22.2	23.4	16.7	18.1	22.2
30' to 34'11"[2]	45.8	50.5	46.5	38.8	37.8	34.8	25.9	21.7
Over 35'	4.4							
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Market Share



[1] Prior to 1984 category was 26' to 29'.
[2] Prior to 1984 category was over 29'.
NOTE: Parts may not add to totals due to rounding.

THE CONSUMER

In our continuing effort to monitor changes in demand for RVs the Recreation Vehicle Industry Association commissioned Dr. Richard T. Curtin, Director of Consumer Surveys, University of Michigan, to update his earlier research on the current RV consumer.

His report, "The RV Consumer: Current Trends and Future Prospects," released in 1980 explored the demographic profile of the RV consumer for the first time. In this latest study, Dr. Curtin has measured the change that has occurred in the demographics since that first report and has developed answers to important questions, such as: "How will consumers react to the new economic environment of the '80's?" and "Who will be the RV purchasers of the future?"

Just five years ago, many industry observers pronounced the demise of the RV market. Consumer demand for RVs is a function of consumer preferences, prices, and income. Therefore, they reasoned, rising energy prices and curtailed incomes would not only decrease sales, but consumer preferences would turn away from the RV lifestyle as well. But no such evidence can be found in the survey results of our latest consumer study. While it is true that rising energy prices and the associated downsizing of vehicles continue to present challenges to the industry, consumers have shown their willingness to adapt to these new constraints.

RV Ownership Nears 10%

Indeed, the proportion of American families that currently own an RV has grown in recent years, rising to nearly one-in-ten families in 1984. Since 1980 the market growth was greatest in the West where RV ownership rates increased from 13.1% of all vehicle owning households to 16.9%. In the North Central states the rate has increased to 9.8% and in the Northeast was up to 8.4%. Only in the South did the ownership rate slip, down 0.8% to 6.6%, overall. Changes were also measured by age group where ownership rates grew most for those between the ages of 35 and 54 years.

Moreover, the study found that the potential for future growth is substantial, with more than one-fourth of all American families having some interest in the use of an RV. Although the overall outlook for the RV industry during the decade ahead is bright, the pace of sales will continue to be dominated by cyclical events in the aggregate economy. But unlike prior recession cycles, which were characterized by rising inflation over an extended time period, the next recession is likely to be paced by rising interest rates followed by rising unemployment, but with relatively low inflation.

Three Major Consumer Groups

The mass market for RVs is dominated by three major groups of consumers, each group being distinctive in its demographic composition, in the economic factors which primarily influence its purchase decisions, and in the length of prior ownership. These three groups can be labeled: a) the established core market, b) the new core market, and c) first time buyers. (See page 14.)

Established core market. The established core market consists of consumers that have owned at least two RVs in the past. These consumers are generally older, (only 8% are under 35 years of age) and, if they are still working, generally have higher-than-average income. Since many of these consumers are retired or near retirement, the economic factors which primarily influence their decisions are distinctive in that RV purchases are primarily financed out of accumulated savings, not out of future earnings via credit. For these consumers, trends in inflation represent the primary threat to the adequancy of their accumulated savings, and hence their future living standards. Even if the upcoming decade is marked by relatively slow economic growth, with persistent bouts of high unemployment and interest rates, prospects for sales among consumers in the established core market will remain favorable if inflation remains relatively low and stable. As usual, these consumers will provide the largest share of demand during cyclical downturns. Rather than the timing of their purchase decisions being primarily determined by trends in employment, wages, or interest rates, these consumers place greater emphasis on product prices and product features.

New core market. The new core market represents the group of consumers that currently own RVs and expect to buy replacement vehicles in the future, on average within the next three and a half years in fact. These consumers are generally middle aged with above-median household income. Their purchases are usually financed out of accumulated savings as well as credit, with the proportion of the total price being financed falling as they age. Since their purchases often involve the use of credit, future employment and income prospects as well as interest rates directly influence their decisions. Given favorable financial and credit conditions, members of the new core market are more likely to stress size as the primary criteria for the selection of their next RV.

First-time buyer. Entering the RV market for the first time, these consumers are generally younger and have household incomes near the overall median. Compared with the previous two groups, the timing of their purchase decisions are much more dependent on credit conditions, and on household income and employment prospects. Ac-

cumulated savings only play a small role in these purchase decisions. Younger families more often suffer financial reversals during recessions and sales to this group only slowly respond to improved economic conditions following the rebuilding of family finances. Rather than size or features, it is the price that is most important to first-time buyers.

First-time purchasers are often "payment" buyers. It is the size of the monthly loan payments on which they judge whether the expenditure is affordable, or within their budget. For the credit buyer, longer maturities would greatly facilitate RV sales for this third group.

7 in 10 Current Owners Will Buy Again

It is often said that the best prospect for a future sale is a past customer. This is doubly true of RV consumer where a full 70% of current owners intend to purchase again. First-time buyers will be of increasing importance for they will be the next generation of new core consumers.

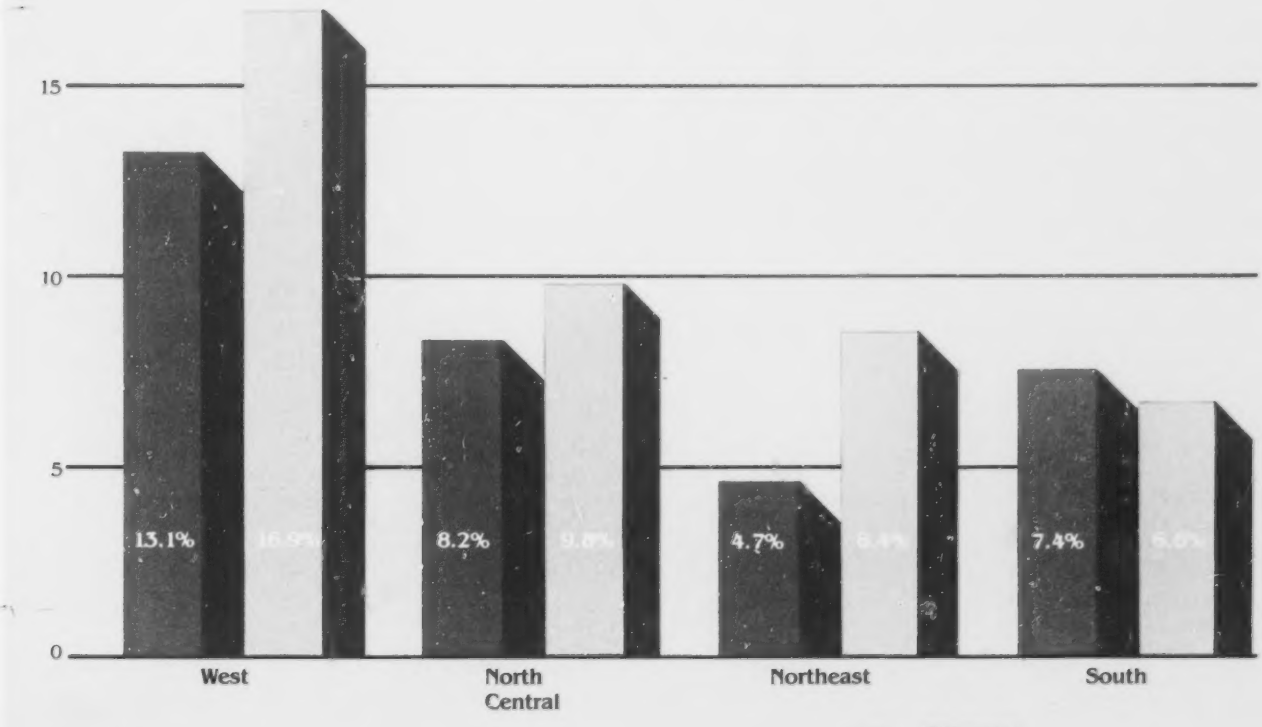
In addition, new rental arrangements provide an excellent opportunity to introduce consumers to the RV lifestyle. A full 14% of all vehicle-owning households in the U. S. today have an interest in renting an RV. And it is their active rental interest that also makes these consumers excellent prospects for future RV ownership. (See page 14.)

Because first-time buyers place primary emphasis on price and credit affordability, it is important to have adequate entry level RV products available. Even if the entry level products lack some of the standard features, the purchase of these products will build consumer identification with the RV industry, and pave the way for larger and more expensive repeat purchases in the future. ■

The data supplied for this report are based on a survey sample of 2,491 vehicle-owning households from the September 1984, through December 1984, nationally representative monthly Survey of Consumer Attitudes, conducted by the Survey Research Center at the University of Michigan, Ann Arbor, Michigan

RV Ownership by Region

Percent of Households



The RV Consumer: Current Trends and Future Prospects
Survey Research Center, University of Michigan, 1984

Future Purchase Intentions of Current Owners

The RV Consumer: Current Trends and Future Prospects
Survey Research Center, University of Michigan, 1984

Potential RV Market

	Current Owners	Non-Owners Ownership	Expressing Interest in Rental Only
All Families	10%	4%	14%
Ages			
18-34 years	6	5	21
35-54 years	14	4	14
55 and older	10	3	6
Region:			
West	17	4	16
North Central	10	4	14
Northeast	8	5	12
South	7	4	14

The RV Consumer: Current Trends and Future Prospects
Survey Research Center, University of Michigan, 1984

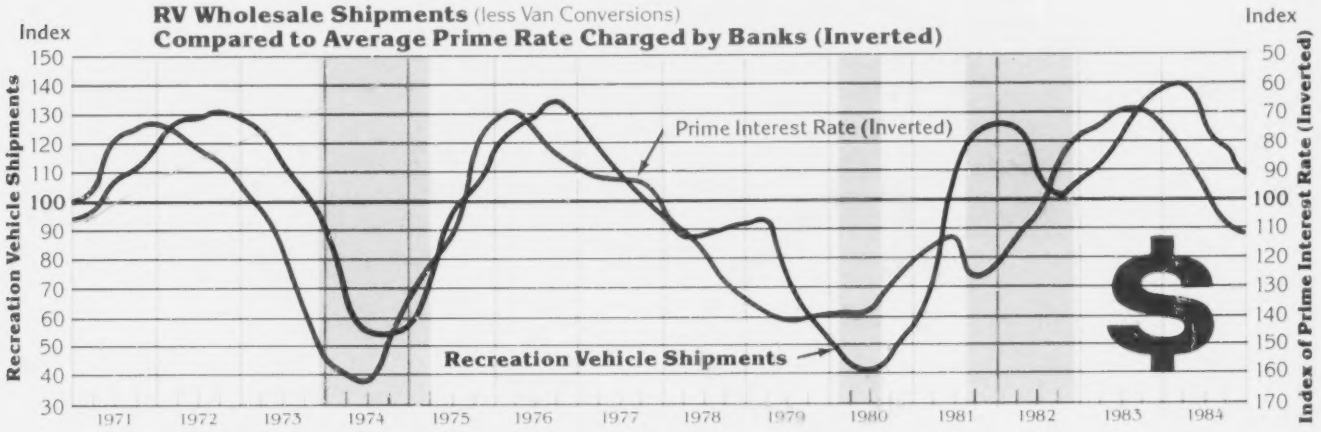
Appendix

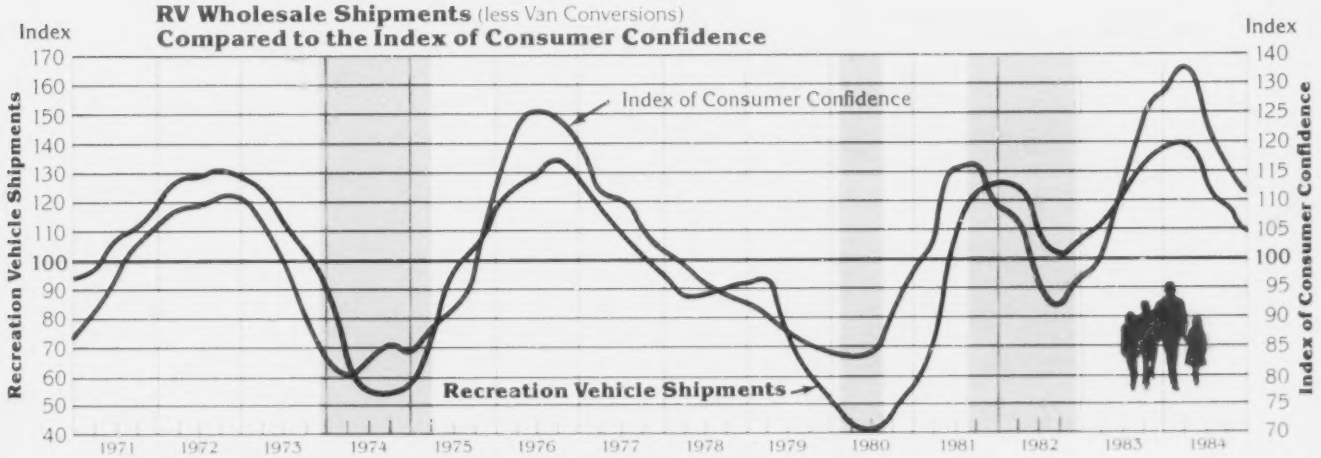
Cyclical Indicators

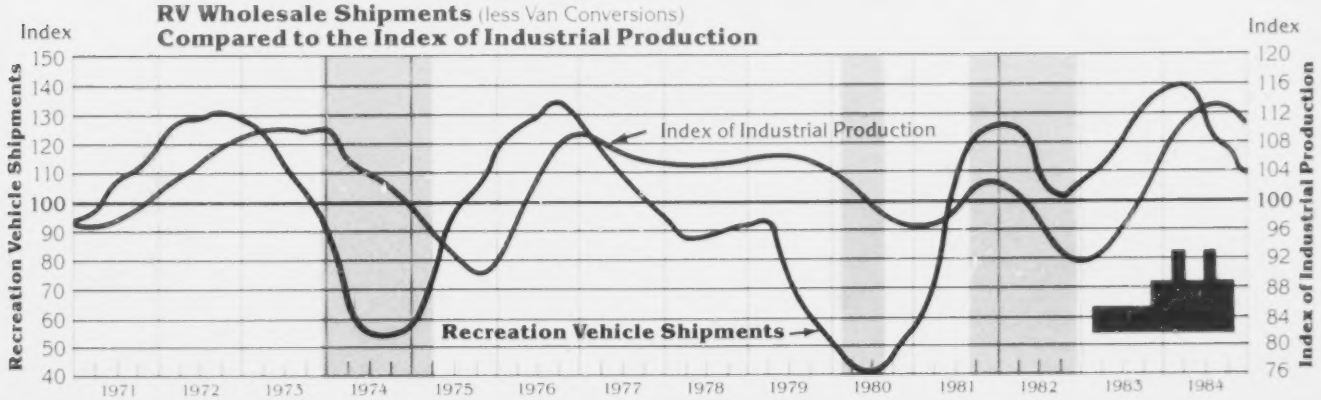
The charts below depict the rate of change of a twelve-month moving average for Average Prime Rate Charged by Banks (Inverted),[1] the Index of Consumer Confidence,[2] and the Index of Industrial Production[1] compared to RV Wholesale Shipments (Less Van Conversions).[3] We've plotted them on different scales. RVs on the left and comparative indicators on the right, in order to keep the amplitudes about the same. The shaded areas represent periods of recession.

Notice that changes in the Prime Interest Rate lead RV sales while consumer confidence coincides. The final chart shows how Industrial Production lags the RV curve.

[1] Compiled by the U.S. Dept. of Commerce
[2] University of Michigan Survey Research Center
[3] Compiled by Recreation Vehicle Industry Association


RV Wholesale Shipments (less Van Conversions)
Compared to Average Prime Rate Charged by Banks (Inverted)
Index
Recreation Vehicle Shipments
Index of Prime Interest Rate (Inverted)
Prime Interest Rate (Inverted)
Recreation Vehicle Shipments
150 140 130 120 110 100 90 80 70 60 50 40 30
50 60 70 80 90 100 110 120 130 140 150 160 170
1971 1972 1973 1974 1975 1976 1977 1978 1979 1980 1981 1982 1983 1984


RV Wholesale Shipments (less Van Conversions)
Compared to the Index of Consumer Confidence
Index
Recreation Vehicle Shipments
Index of Consumer Confidence
Index of Consumer Confidence
Recreation Vehicle Shipments
170 160 150 140 130 120 110 100 90 80 70 60 50 40
140 130 125 120 115 110 105 100 95 90 85 80 75 70
1971 1972 1973 1974 1975 1976 1977 1978 1979 1980 1981 1982 1983 1984


RV Wholesale Shipments (less Van Conversions)
Compared to the Index of Industrial Production
Index
Recreation Vehicle Shipments
Index of Industrial Production
Index of Industrial Production
Recreation Vehicle Shipments
150 140 130 120 110 100 90 80 70 60 50 40
120 116 112 108 104 100 96 92 88 84 80 76
1971 1972 1973 1974 1975 1976 1977 1978 1979 1980 1981 1982 1983 1984

Shaded areas represent periods of recession

Vehicle Categories

Travel Trailer

A trailer designed to be towed by a motorized vehicle (auto, van or pick-up truck) and of such size and weight as not to require a special highway movement permit. It is designed to provide temporary living quarters for recreational, camping or travel use and does not require permanent on-site hook-up. A travel trailer can be one of the following types:

Conventional Travel Trailer

Ranges typically from 12 feet to 35 feet in length, and is towed by means of a bumper or frame hitch attached to the towing vehicle.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$ 9,135**	$ 8,813	$ 7,320	$ 7,283	$ 7,124[1]	$ 5,548	$ 5,021	$ 5,287	$ 4,338
Retail	**$11,419**	$11,016	$ 9,150	$ 9,104	$ 8,905[1]	$ 7,396	$ 6,694	$ 7,032	$ 5,759

Park Trailer

Designated for seasonal or temporary living. When set up, may be connected to utilities necessary for operation of installed fixtures and appliances. Built on a single permanent chassis mounted on wheels and capable of being towed without special highway movement permits by a motorized vehicle. Not more than 40 feet overall body length and no more than 8 feet in overall body width when in the traveling mode. Designed for set-up by person without special skills using only hand tools which may include lifting pulling or supporting devices.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$12,944**	$11,864	$11,534	$10,370	*	*	*	*	*
Retail	**$16,180**	$14,830	$14,417	$12,963	*	*	*	*	*

Fifth Wheel Travel Trailer

This unit can be equipped the same as the conventional travel trailer but is constructed with a raised forward section that allows a bi-level floor plan. This style is designed to be towed by a vehicle equipped with a device known as a fifth wheel hitch.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$11,910**	$10,965	$ 9,677	$ 9,647	$ 9,854	$ 8,348	$ 7,317	$ 6,840	$ 5,725
Retail	**$14,888**	$13,706	$12,096	$12,059	$12,318	$11,134	$ 9,756	$ 9,118	$ 7,614

Folding Camping Trailer

A recreation camping unit designed for temporary living quarters which is mounted on wheels and constructed with collapsible sidewalls that fold for towing by a motorized vehicle.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$ 2,724**	$ 2,510	$ 2,457	$ 2,316	$ 2,155	$ 2,006	$ 1,803	$ 1,714	$ 1,647
Retail	**$ 3,541**	$ 3,263	$ 3,194	$ 3,011	$ 2,801	$ 2,677	$ 2,404	$ 2,285	$ 2,191

Truck Camper

A recreational camping unit designed to be loaded onto, or affixed to, the bed or chassis of a truck, constructed to provide temporary living quarters for recreational, camping or travel use.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$ 4,639**	$ 4,051	$ 3,864	$ 3,072	$ 2,610	$ 2,580	$ 2,580	$ 2,317	$ 2,008
Retail	**$ 6,031**	$ 5,266	$ 5,023	$ 3,994	$ 3,393	$ 3,442	$ 3,437	$ 3,089	$ 2,671

Motor Home

A recreational camping and travel vehicle built on or as an integral part of a self-propelled motor vehicle chassis. It may provide kitchen, sleeping and bathroom facilities and is equipped with the ability to store and carry fresh water and sewage. A motor home can be one of the following types:

Conventional Motor Home – Type A

The living unit has been entirely constructed on a bare, specially designed motor vehicle chassis.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$35,397**	$32,285	$28,621	$26,196	$23,076	$19,605	$17,044	$18,731	$16,047
Retail	**$44,246**	$40,356	$35,776	$32,745	$28,845	$26,137	$22,725	$24,968	$21,342

Van Camper – Type B

A panel-type truck to which the RV manufacturer adds any two of the following conveniences: sleeping, kitchen and toilet facilities, also 110 volt hook-up, fresh water storage, city water hook-up, and a top extension to provide more head room.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$16,691**	$16,262	$13,234	$11,372	$11,319	$11,294	$10,542	$ 9,286	$ 6,768
Retail	**$20,864**	$20,328	$16,542	$14,215	$14,149	$15,041	$12,650	$12,350	$ 9,024

Motor Home – Type C (Mini)

This unit is built on an automotive manufactured van frame with an attached cab section of a GVWR of 6500 pounds or more, with an overall height of more than eight feet. The RV manufacturer completes the body section containing the living area and attaches it to the cab section.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$23,620**	$21,949	$18,359	$16,649	$14,344	$12,819[2]	$11,672[2]	$11,072[2]	$ 9,025[2]
Retail	**$29,525**	$27,436	$22,948	$20,811	$17,930	$17,093[2]	$15,562[2]	$14,759[2]	$12,033[2]

Motor Home – Type C (Low Profile)

This unit is built on an automotive manufactured van frame with an attached cab section having a GVWR of 6500 pounds or more, with an overall height of less than eight feet. The RV manufacturer completes the body section containing the living area and attaches it to the cab section.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$20,938**	$20,153	$20,833	$15,130	$13,210	*	*	*	*
Retail	**$26,173**	$25,191	$26,041	$18,913	$16,513	*	*	*	*

Motor Home – Type C (Compact)

This unit is built on an automotive manufactured cab and chassis having a GVWR of less than 6500 pounds. It may provide any or all of the conveniences of the large units.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$15,343**	$15,006	$13,827	$12,513	$10,609	*	*	*	*
Retail	**$19,179**	$18,758	$17,283	$15,641	$13,261	*	*	*	*

Van Conversion

A completed van chassis modified esthetically or decoratively in appearance by the RV manufacturer for transportation and recreational purposes. These changes may include windows, carpeting, paneling, seats, sofas, and accessories.

Value	1984	1983	1982	1981	1980	1979	1978	1977	1976
Whsl.	**$15,877**	$15,331	$11,521	$ 9,587	$ 9,152	$11,199	$ 9,812	$ 7,305	$ 5,493
Retail	**$19,052**	$18,397	$13,825	$11,504	$10,982	$13,439	$11,774	$ 9,715	$ 7,324

[1] Includes Park Trailers
[2] Average All Motor Homes – Type C
* Prior to 1980, data not surveyed